

Registration for country coordinators

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Some initial thoughts

Generic email address

The PERI registration system will generate some additional email for country coordinators and their teams. It could be worth setting up a specific email address to receive this email. This will help in the following ways:

- PERI-related messages are kept separate from your individual mailboxes
- It can be checked by several persons, ensuring efficiency and continuity when team members are away
- The email address can be displayed on the website and sent to all new registrants within your country
- Country coordinators and their teams would need to agree a system so that this account is checked regularly (daily or twice daily).

Use of IP addresses

Any opportunity should be used to encourage all institutions to register using their IP address. In response to publisher requests, INASP is strengthening its requirement for IP registration: although this will not yet be compulsory, IP registration has many benefits and registrants will be encouraged to check with their systems librarian or institutional network manager, before requesting username/password (from those publishers who permit UN/PW access). This will result in more widespread registration by IP address, which will benefit all PERI stake-holders, delivering seamless access for users, administrative efficiencies for librarians and institute-specific usage data for all. Please advise registrants that they must use an external IP address. Many supply internal IP addresses which cannot be used. Internal IP addresses can be easily recognised as they start 192.168. or 172.168 or 10.0.

IP addresses within the following ranges will not be accepted:

10.0.0.0 - 10.255.255.255

172.16.0.0 - 172.31.255.255

192.168.0.0 - 192.168.255.255

In cases of Username and Password (UN/PW) access, institutions **MUST** request their own UN/PW and not share that of another institute.

Summary of the registration process

In all cases below, where we have indicated Country Coordinator, this can be any member of the Country Coordination team.

- The PERI resource pages will point institutions to the registration system
- New institutions will complete a single form which will act like an application form to participate within PERI; this will be submitted to the country coordinator, copied to INASP
- The country coordinator has ten working days in which to approve or reject this application, based on the PERI eligibility criteria at <http://www.inasp.info/uploaded/documents/eligibility%20question.html>
- If an institution is rejected, an email explanation should be sent to the applicant, authored by the country coordinator
- If the institution is accepted, an automatic acceptance email is sent to the applicant
- The applicant can then return to the PERI registration pages and register for any of the information resources available to them. The registrant will not need to re-enter their institutional information, simplifying the process
- Resource registrations are sent directly to the publisher, as an email, copied to INASP

- The publisher has ten working days in which to approve or reject each registration. Rejection is unlikely since the application process has checked for eligibility
- The publisher will send the successful registrant access details
- In terms of licensing agreements, each institution needs to register separately with each relevant resource, there is no bulk registration.
- Eligible institutions which have registered successfully can use this system to update their details to **country coordinators** and publishers at any time
- Help documentation is available at <http://wsb-inasp.mantis.esw.zomo.co.uk/file/659/access-support-documents-to-download.html#Registration>

Criteria for eligibility

INASP supports and negotiates access to e-resources for the following institutions:

university departments, university libraries, not-for-profit research institutions and centres, higher education institutions, colleges, polytechnics, teaching hospitals, professional training schools, local, regional and national non-government organisations (NGOs), indigenous Civil Society Organisations (CSOs) and government ministries, offices and agencies. Access is also available to health professionals and agricultural extension workers and other professions with a not-for-profit remit, working in remote areas when associated with one of the above institutions.

In some countries and for some publishers there may be additional restrictions, for example, based on the license agreement. If you are not sure whether an institution is eligible to access a resource, please contact INASP.

Additional features

- Country coordinators can log on to the site at any time to see registration activity in their country
- Viewing and approving new registrations gives the country coordinator control and will be useful for consortia development
- Country coordinators / coordinating teams / consortium administrators have the option to exclude non-members from registering for certain paid resources. They should be allowed to register for free resources.
- Reports showing all registrations, by publisher or by date can be downloaded in Excel
- The system provides information which can be used in promotional activities
- The system should avoid time-consuming duplicate, ineligible or inaccurate registrations
- Country coordinators are free to introduce any controls they wish concerning username and password access, but should abide by the INASP policy at <http://www.inasp.info/uploaded/documents/INASP%20policy%20on%20username%20and%20password%20access.pdf>
- Institutions may only register once, encouraging sharing of access details within the institution

Logging on

The registration website will hold information which could be abused in the wrong hands, so country coordinators must log on to view their country registrations. Log on details will be emailed to the coordinator and should not be shared outside of the coordination team. Log on url is <http://peri.inasp.info/peri/admin-cgi/peri-admin.pl>

All institutions will be directed to <http://peri.inasp.info/peri/peri.pl> to apply and register

Setting preferences

You will be able to logon using the information sent to you in an introductory email and then set your own preferences ([see below](#))

Processing registrations

Automatic emails

When a new institution first applies, the country coordinator will receive an email as below.

Subject: New PERI institution
To: countrycoord@hotmail.com
From: PERI <perireg@inasp.info>

This is an automated email sent by the PERI system.

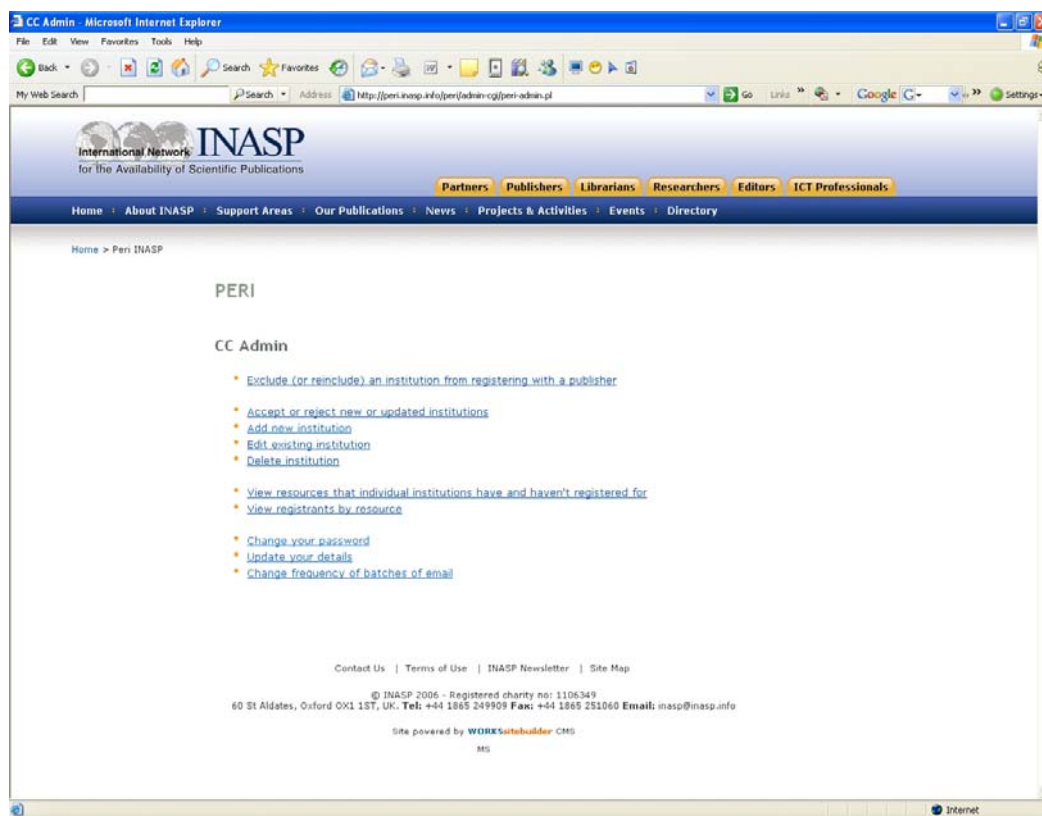
A new institution (called "This University") has applied to register on the PERI system. Please login at <http://peri.inasp.info/peri/admin-cgi/peri-admin.pl> and either accept or reject the new institution. Full details of the institution are available via the PERI system.

Your username on the PERI system is "user2".

If you've forgotten your password then please send an email with the subject line New Password Request to perireg@inasp.info. A new password will then be sent to you.

Log on

The country coordinator can log on at <http://peri.inasp.info/peri/admin-cgi/peri-admin.pl> and will see the screen below



Registrations

Accept or reject new or updated institutions

- The country coordinator will see any pending institutions requiring approval
- Clicking on the institution will open the application form for that institution
- The country coordinator can edit the form if necessary (e.g. if there are obvious address or email errors)
- If the application is to be rejected, there is space to insert a rejection message
- If all is in order, the form can be accepted by clicking on an Accept button
- If there are several duplicate applications, only accept ONE
- When the country coordinator selects Accept, an automated email is sent to the institution to tell them the registration has been accepted and to advise them to register for any/all resources available to them

Add new institution

- The country coordinator can complete an application form on behalf of any institution
- Where the country coordinator completes the form, it is automatically accepted

Edit existing institution

- The country coordinator can access a list of all registrants in his/her country at any time
- The details for any institution can be updated by the country coordinator
- Where the country coordinator completes the form, it is automatically accepted

Delete institution

- Only use this to clean up duplicates
- You must ensure there is only one entry for each institution
 - Only accept one occurrence of an update
 - Periodically check through and delete duplicates if necessary
- To delete duplicate entries
 - Look at the list of resources the institution is and is not registered with
 - Look to see if they are registered with *NONE* in any entry
 - Note the iid (institutional ID) number in the url of the *NONE* entry
 - Go to delete institution
 - Select an entry for the institution
 - Check that the iid number in the url is that of the entry you want to delete
 - If both or all entries for the institution show registrations, you will need to transfer these before deleting the entry
- If you need to cancel an institution's registration with a publisher, you need to let the publisher know to disable access, inform the institution and inform perireg@inasp.info so the registration can be nullified.

Exclude (or reinclude) an institution from registering with a publisher

This option is provided for consortium administrators

It applies if a publisher had agreed a set number of subscriptions and the consortium administrator needs to exclude certain institution from registering

Eligible institutions need to be agreed with the publisher, through INASP, at the time of selection/renewal of the resource and cannot be changed during the year.

Please note that you EXCLUDE those NOT eligible

This option should never be used on the free resources where access is country wide

Viewing and downloading

View resources that individual institutions have and haven't registered for

- The country coordinator can select any institution
- Clicking on the link for that institution shows the registration activity of the institution
- Institutions are entitled NOT to register for resources which are not relevant to that institution
- To ensure best use of resources, country coordinators and their teams may wish to follow up institutions which have not registered for all available resources

View registrants by resource

- The country coordinator can select any resource
- Clicking on the link for that resource shows all institutions which have registered for it
- This can be limited by date
- Results can be downloaded either by individual resource or for all resources
- Again, to ensure best use of resources, country coordinators and their teams may wish to follow up with institutions which have not registered for all available resources

Preferences

Change your password

- Country coordinators can change their administration password to something memorable after their first log-in. If country coordinators are working in a team, they will need to share any changes to the log-in information with all team members.

Update your details

- You can update your contact details. The country coordinator's details will be available to registrants within your country.
- You can include several email addresses, if you separate them with a comma.

Change frequency of batches of emails

- You can select the frequency with which you receive batches of email, to a maximum of 7 days. This means you could set it to receive PERI registrations each Monday, for example. You also have the option to receive each application email immediately it is made.

Implementing a registration process

Developing a routine

- All registrations should be checked and replies given within ten working days
- This could be done by one person or by anyone authorised to do so within your PERI coordination team
- INASP strongly recommends a team approach to (a) ensure continuity where colleagues are away, on holiday or off sick and (b) minimise workload for any one individual. The person(s) responsible need/s to be aware of their role and approach this systematically
- Email reminders will be sent to country coordinators, copied to INASP
- If you forget your password you can request a new one by sending an email with the subject line New Password Request to perireg@inasp.info or going to <http://peri.inasp.info/peri/peri.pl?forgot=1>

Eligibility of institutions

Please adhere to the eligibility criteria at <http://www.inasp.info/uploaded/documents/eligibility%20question.html>

- Countries may, after discussing with INASP, have additional criteria.

Follow up with registrants

Countries may approach the opportunities offered by the new system in a several ways as suits their situation but the following are some suggestions country coordinators have made to INASP

Introductions

- Country coordination teams are keen to learn about new institutional applicants so that they can make contact and introduce themselves personally, the team or consortium and the programme; this helps the spread of PERI and increases use of the resources

Consortium issues

- Having access to this information will also enhance contact between institutions, vital in the growth and development of consortia

Promotion

- Knowing the registration status of institutions will enable the country coordination team to target promotional activities
- INASP can provide start up / information packs to country coordinators to assist in this. Please see the Information for Librarians pages which link from each publisher's page for materials which country coordinators may use.
- You can now refer institutions to the "[A list of resources](#) your institution is already registered to use is available" link on <http://peri.inasp.info/peri/peri.pl>. By clicking this, then working through the process of selecting their country and institution, each institution can see which resources it has registered for. Those resources with a live link are current subscriptions, the resources listed in plain text with no link are resources where there is no subscription this year, but the institution had registered in previous years when the resource was available and the publisher has not cancelled the registration.